Instructions for Ordering IT Goods and Services by In Scope eVA Interface Executive Branch Agencies

February 2011

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General Instructions

1. **IT goods and services as related to these instructions are defined by the list provided at the following site**:

   http://www.vita.virginia.gov/uploadedFiles/SCM/IT_Goods_Services_012111.pdf

   In-scope goods and services are those identified in the above list by a "Y" in the "In-scope To VITA" column. Items with an "N" in the column are defined as out-of-scope.

   To view VITA Hardware Standards go to the following site:
   VITA: VITA Services Overview

   Click on the hardware or services you are interested in.

1. **Orders for In-Scope IT Goods and Services:** For In-Scope goods and services, agency delegated procurement authority is 0. All orders for in-scope IT goods and services must be routed to VITA for review and approval. This is accomplished by selecting the appropriate eVA "VR1" PO Category when entering the order.

   - The eVA order will be created as a non-catalog order.
   - The Vendor selected will be Virginia Information Technologies Agency
   - The order dollar value will be 0.
   - When the request is received at VITA, it will be reviewed and priced. The price seen by the agency AITR in their approval action will be the actual incremental additional monthly billing to the agency by VITA.
   - In the description field enter the specifications of the product or service required. If there is a desired vendor, model, etc., provide that information in the description or comments. If there are lengthy specifications, these should be provided by attachment to the eVA requisition.
   - Enter your agency Bill To address.
   - The use of Pcards is not authorized for VITA IT eVA orders.
   - Avoid the use of Lot for Unit of Measure because of problems in receiving incremental shipments.
   - eVa receiving must be completed for all in-scope orders.
   - The Agency AITR must approve all IT in-scope orders in eVA. Instructions on approval are provided on page 6 of this document.

2. **Orders for out-of-scope IT Goods and Services:** Agencies have been delegated procurement authority for out-of-scope IT goods and services up to $50,000 and can order these goods and services without routing the requisition to VITA. VITA retains procurement authority for out-of-scope goods and services greater than $50,000. The below rules apply to out-of-scope purchases of IT goods and services:

   Out-of-scope orders less than $50,000 (Do not route to VITA):

- Enter the appropriate standard PO category (Not "VR1" category)
- Appropriate use of agency purchasing cards is authorized.
- Enter the actual supplier as the Vendor.
- Enter the agency Bill To address.
- Enter the actual order dollar value.
- Enter specifications of the product or service required in the description field.

Out-of-scope orders over $50,000 (All must be routed to VITA):

- Pcards are not authorized for these orders.
- Use the "VR1" PO category for each of the situations outlined below.
    1. **Non-contract out-of-scope orders over $50,000 (Procurement to be conducted by VITA):**
        - Enter the "VR1" PO category.
        - Enter Virginia Information Technologies Agency as the vendor.
        - Enter the requesting agency "Bill To" address.
        - Enter the estimated dollar value of the requirement.
        - Attach specifications for the goods or services requested.
        - Attach any available vendor quote.
    2. **VITA delegation of one time authority over $50,000 to the agency:**
        - Agency conducts procurement through the IFB/RFP process.
        - Award contract.
        - Create eVA requisition to the successful vendor.
        - Enter the "VR1" PO category to route the requisition to VITA for review.
        - Enter the agency "Bill To".
        - Attach a copy of the awarded contract.
    3. **Out-of-scope orders from an existing contract**:
        - Enter the "VR1" PO category.
        - Enter the actual supplier as the vendor.
        - Enter contract number in the contract number field.
        - Enter the agency "Bill To".
    4. **Out-of-scope sole source orders**:
        - Enter the "VR1" PO category.
        - Enter the actual supplier as the vendor.
        - Enter the agency "Bill To".
        - Attach the approved sole source document.

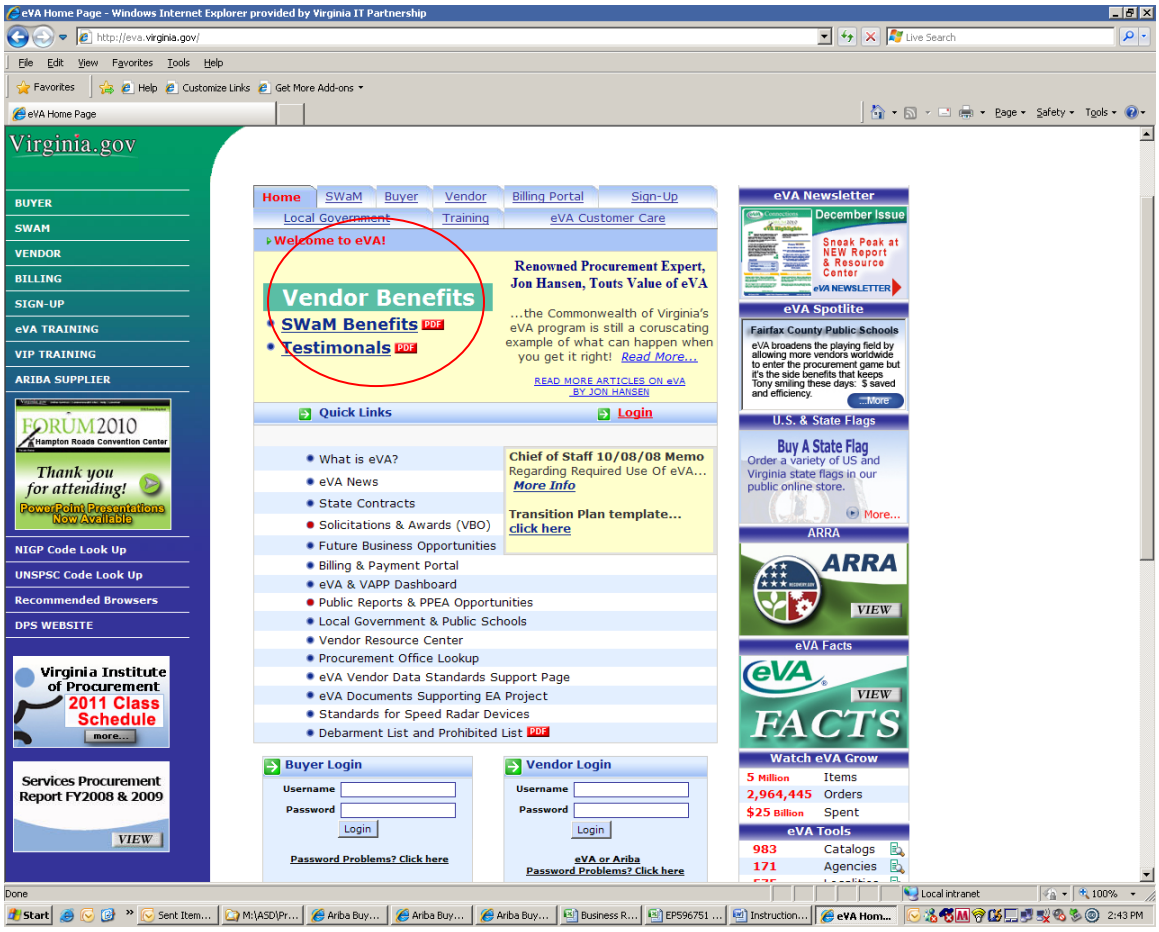
2. **Receiving Orders:** Receiving of orders for in-scope IT goods and services is not for the purpose of paying a vendor directly for the service, instead, the receipt is for the purpose of confirming that the requested service has been received.

   In addition, the notification of a need to receive will not occur in the standard fashion. The service requested will be delivered by VITA's partner, Northrup Grumman, based on a delivery ticket. This ticket will reference the original agency Purchase Order number and request this person pass the information to the receiver to complete the eVA receiving.

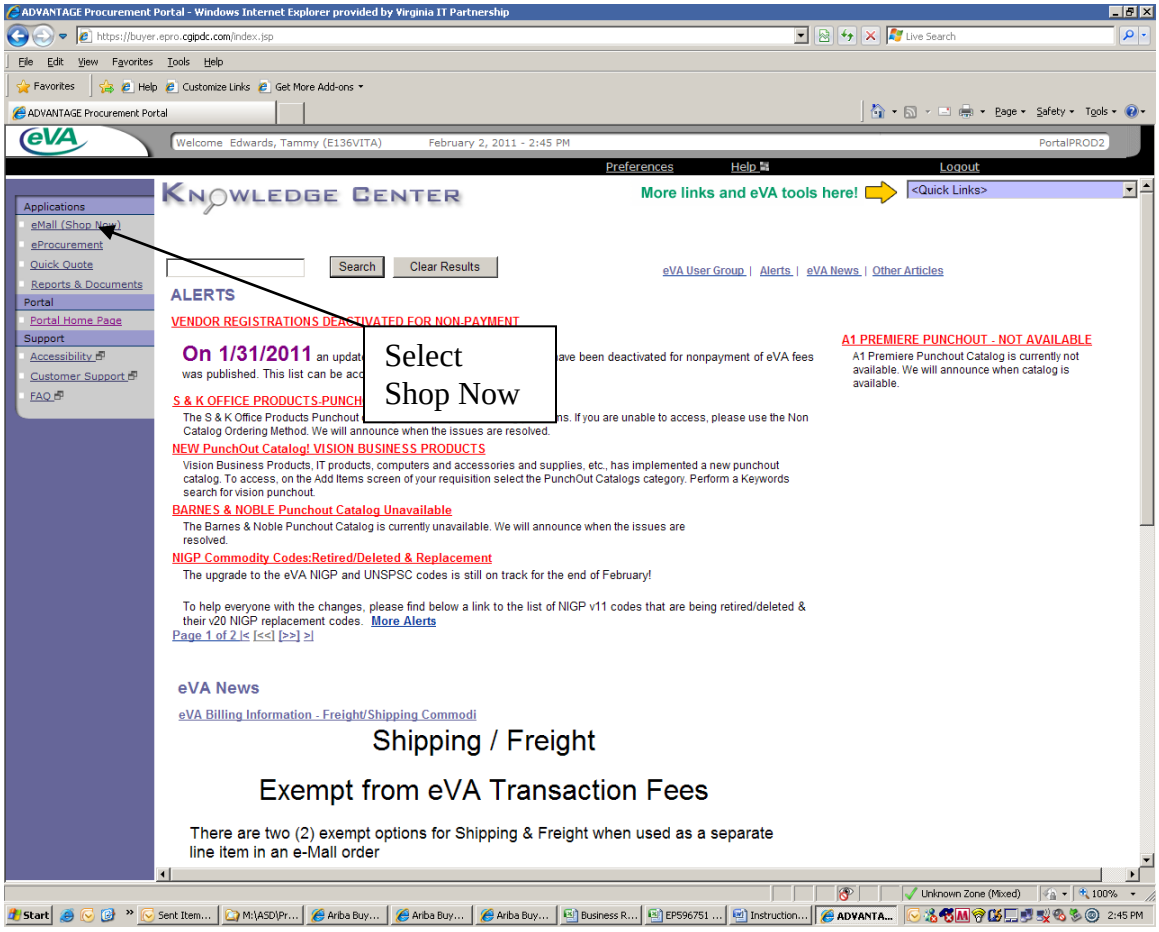
- Receiving for all in-scope infrastructure goods and services orders must be accomplished in eVA.
- When an order reaches the Ordered status, a receiving document is created and placed in the eVA receiving in-box of the person designated to do the receiving.
- Once the item is received and accepted, eVA receiving should be accomplished by the designated person.

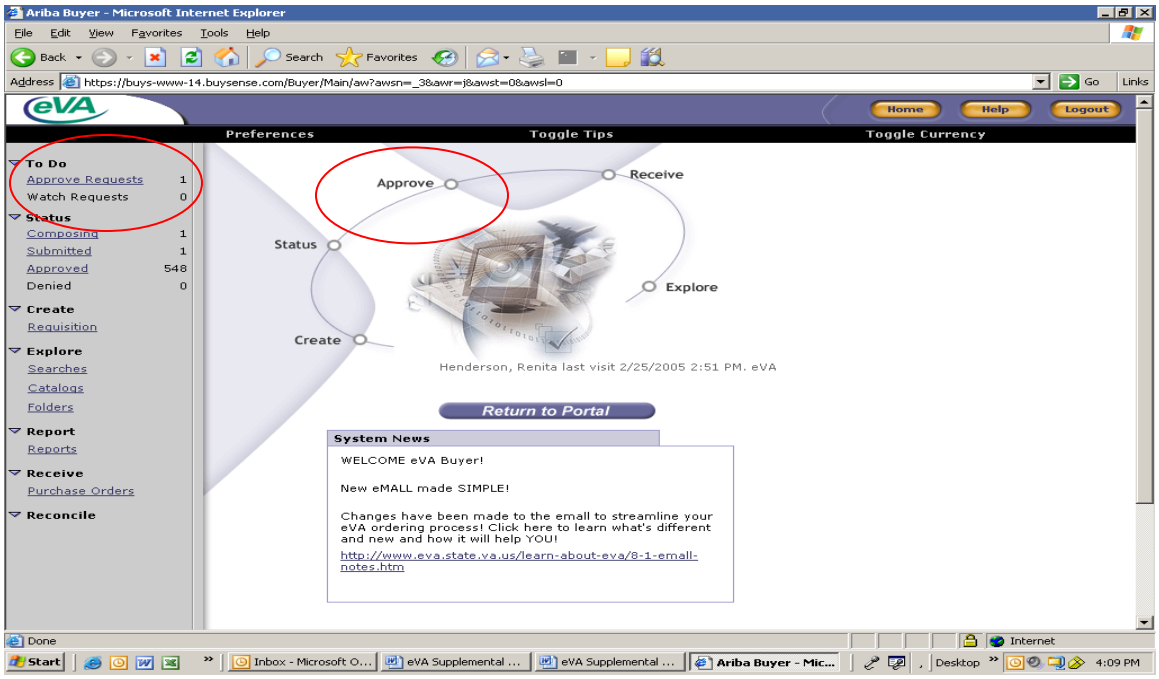
Approval Process:

- To login go to www.eva.virginia.gov

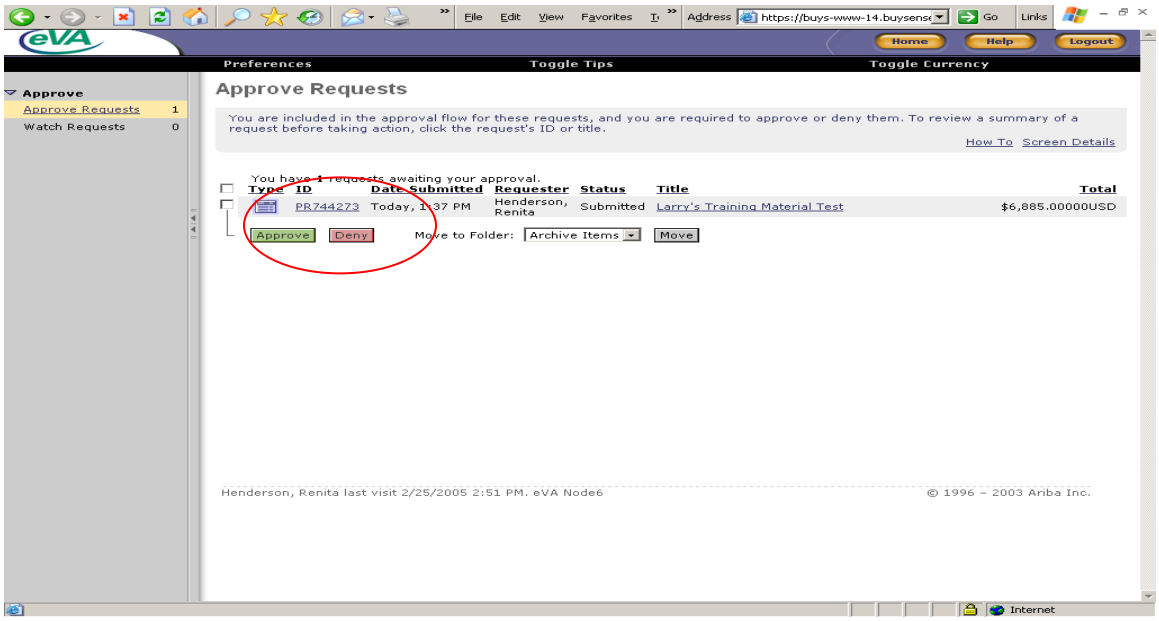


- Enter your assigned user name and password.
- If you forget your password or block your account, click on the Password Problems link below the Buyer Login block and follow the instructions to re-set your password. You will receive an email with a new password.

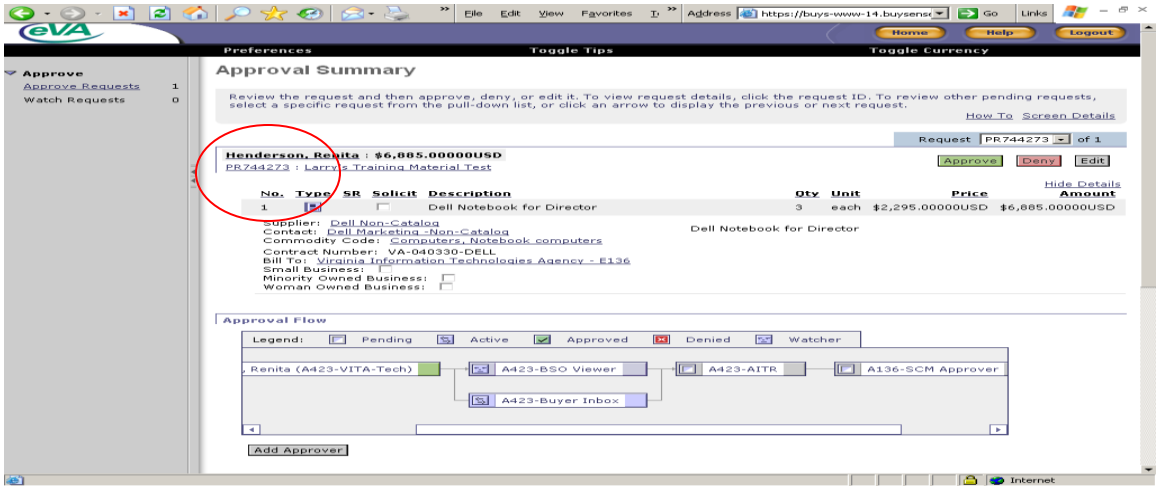

ADVANTAGE Procurement Portal - Windows Internet Explorer provided by Virginia IT Partnership
https://buyer.epro.cgipdc.com/index.jsp
Welcome Edwards, Tammy (E136VITA) February 2, 2011 - 2:45 PM PortalPROD2
Preferences Help Logout
Applications
eMall (Shop Now)
eProcurement
Quick Quote
Reports & Documents
Portal
Portal Home Page
Support
Accessibility
Customer Support
FAQ
KNOWLEDGE CENTER
More links and eVA tools here!
<Quick Links>
Search
Clear Results
eVA User Group | Alerts | eVA News | Other Articles
ALERTS
VENDOR REGISTRATIONS DEACTIVATED FOR NON-PAYMENT
On 1/31/2011 an updat
ave been deactivated for nonpayment of eVA fees
was published. This list can be acc
S & K OFFICE PRODUCTS-PUNCH
The S & K Office Products Punchout
ns. If you are unable to access, please use the Non
Catalog Ordering Method. We will announce when the issues are resolved.
NEW PunchOut Catalog! VISION BUSINESS PRODUCTS
Vision Business Products, IT products, computers and accessories and supplies, etc., has implemented a new punchout catalog. To access, on the Add Items screen of your requisition select the PunchOut Catalogs category. Perform a Keywords search for vision punchout.
BARNES & NOBLE Punchout Catalog Unavailable
The Barnes & Noble Punchout Catalog is currently unavailable. We will announce when the issues are resolved.
NIGP Commodity Codes:Retired/Deleted & Replacement
The upgrade to the eVA NIGP and UNSPSC codes is still on track for the end of February!
To help everyone with the changes, please find below a link to the list of NIGP v11 codes that are being retired/deleted & their v20 NIGP replacement codes. More Alerts
Page 1 of 2 |< [<<] [>>] >|
A1 PREMIERE PUNCHOUT - NOT AVAILABLE
A1 Premiere Punchout Catalog is currently not available. We will announce when catalog is available.
eVA News
eVA Billing Information - Freight/Shipping Commodi
Shipping / Freight
Exempt from eVA Transaction Fees
There are two (2) exempt options for Shipping & Freight when used as a separate line item in an e-Mall order
Select
Shop Now



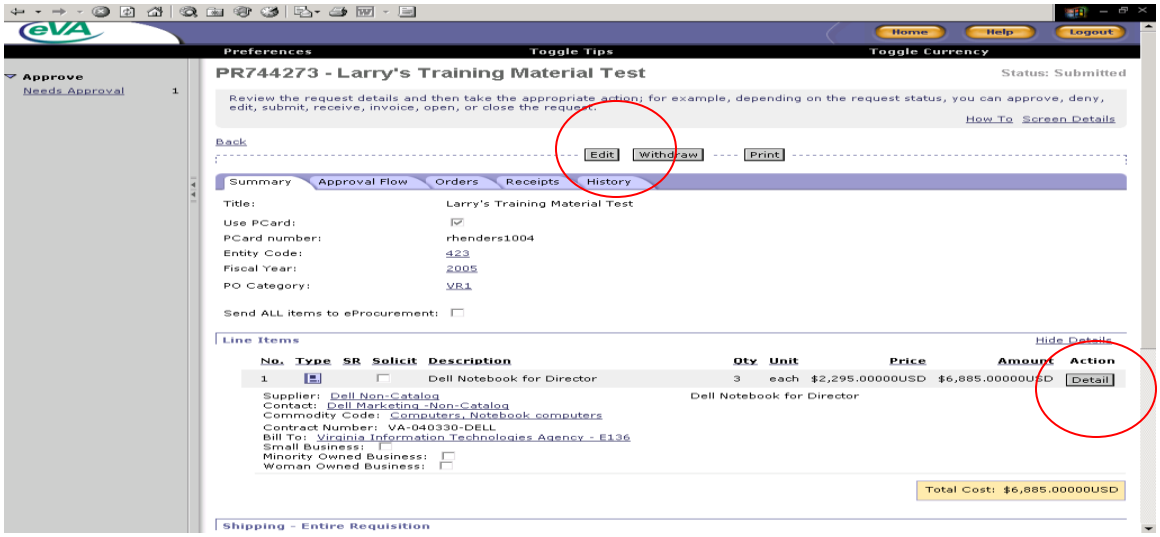
- In this instance there is only one requisition for approval as shown under the To Do heading.
- Click the Approve button to open the approval in box.



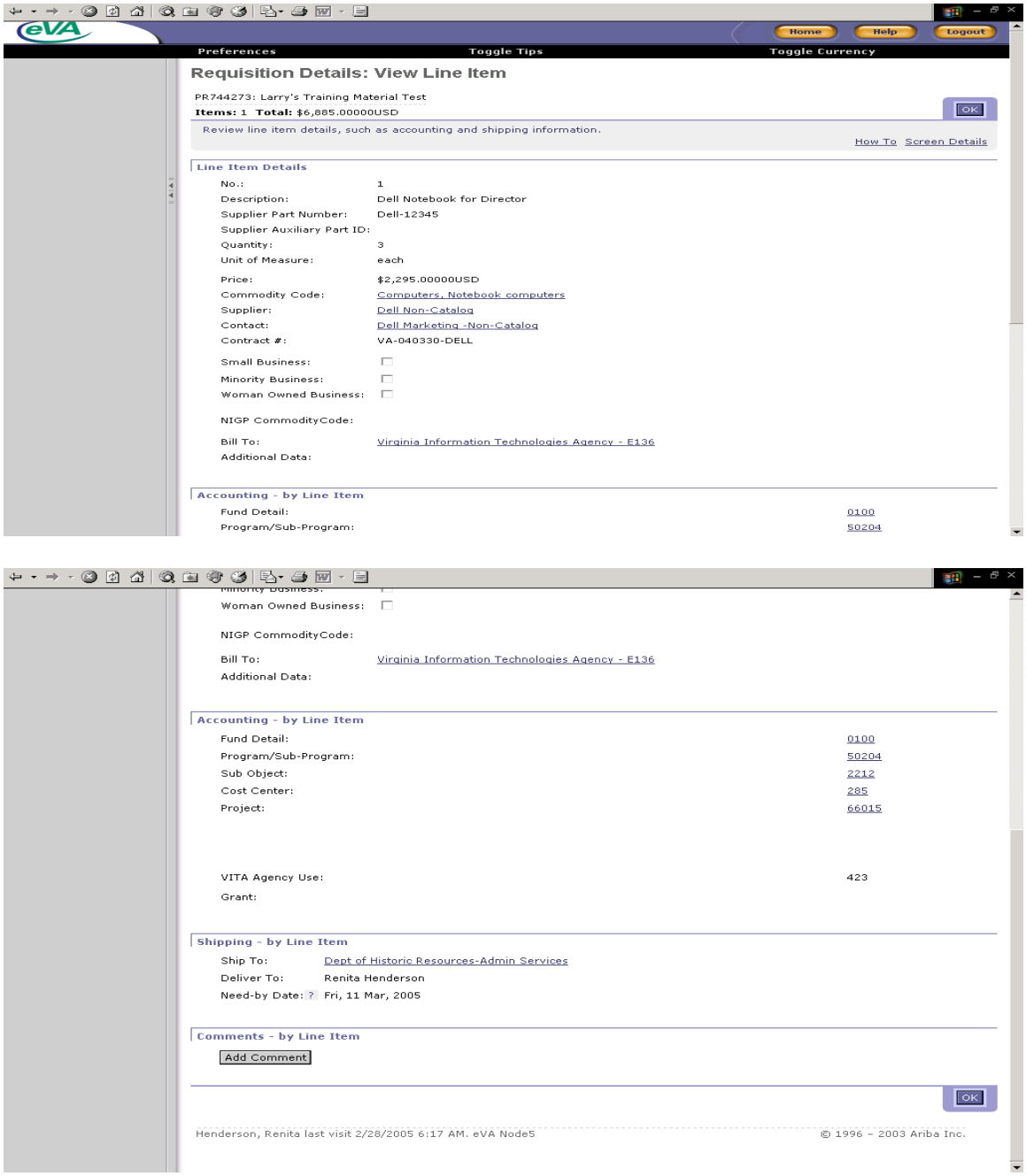
- The requisition could be approved from here. However, this should not be done since the requisition detail has not been reviewed. All details of the requisition should be reviewed prior to approval.
- Click on the PR number to open the requisition for review.



- At this screen you can review each line item on the requisition.
- In addition, you are shown the workflow for this requisition.
- Click on the requisition number to open the requisition for additional review.

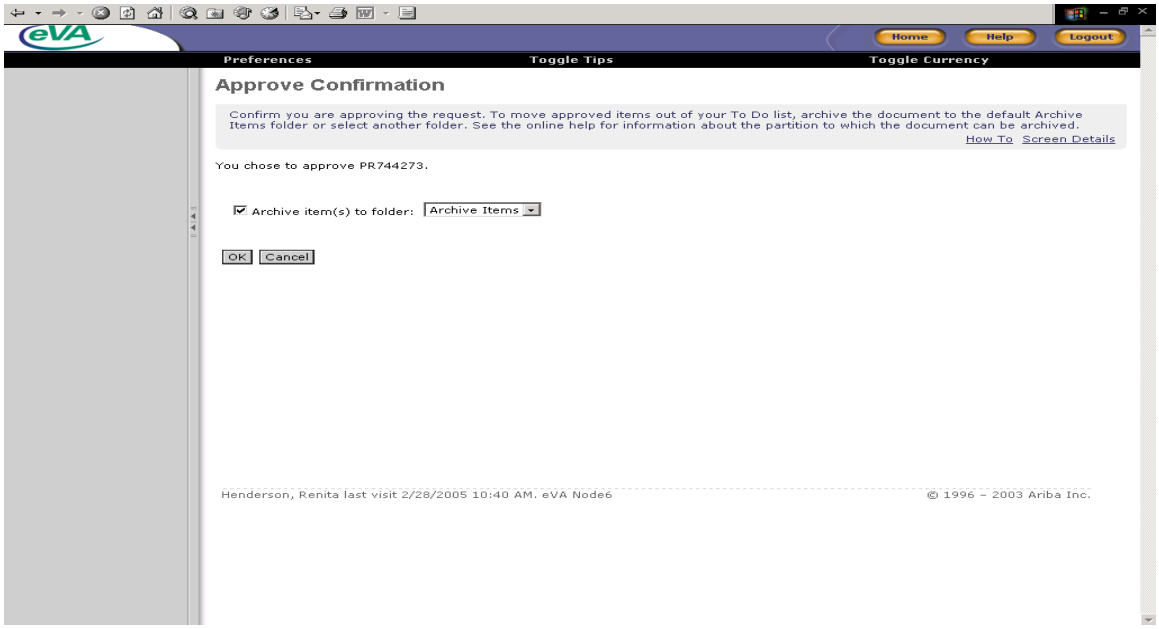


- You must click Edit if you need to change the requisition. You can edit only if you have been given Edit Approval authority in your eVA personal user profile. It is not anticipated that there would be any need to edit at this point since the requisition will have already gone through a technical review at the agency level as well as at VITA.
- The primary purpose for the AITR review is for the acceptance of the financial obligation created by the order.
- Changes/edits to the requisition will start the approval process over.
- Click on Detail to review the remainder of the requisition.



- Review and edit as appropriate.

- When an edited requisition is saved, the above message will appear indicating that the workflow will start over because of the edit of the requisition. Since the requisition has changed it is appropriate that previous approvers review and approve again.
- Click the Save button again and the requisition will go back into the approval workflow.

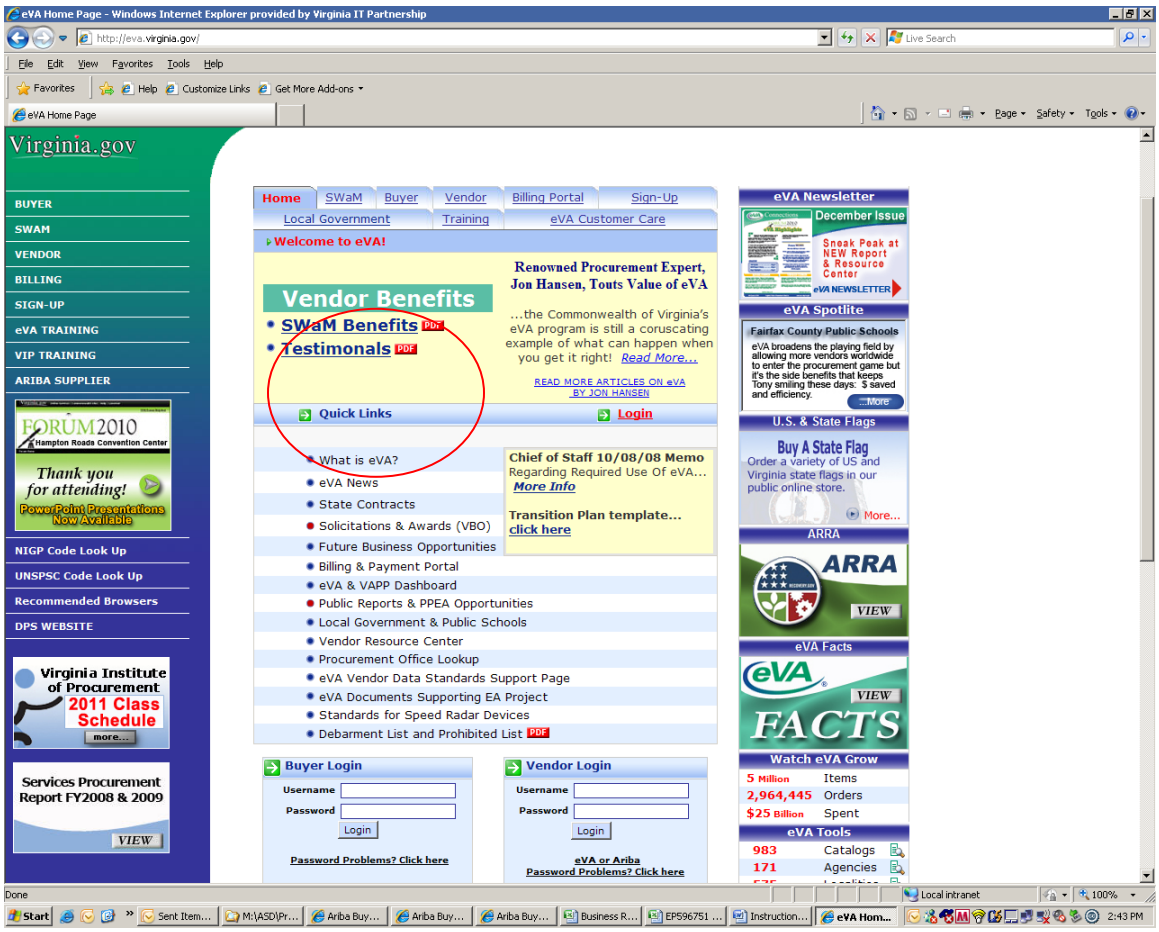


- Click OK to confirm approval.

Receiving Orders

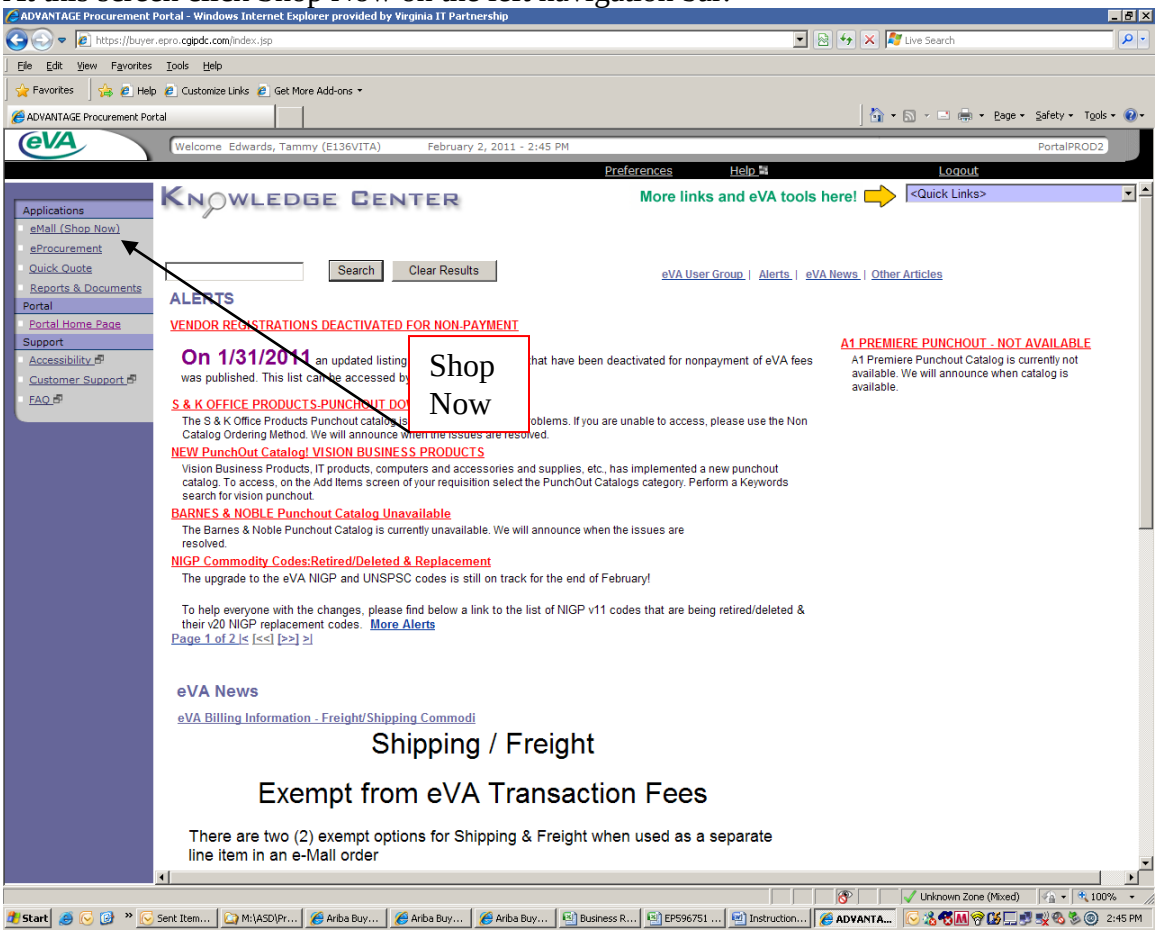
Infrastructure Goods and Services: Receiving for all IT infrastructure goods and services orders must be accomplished in eVA. When an order reaches the Ordered status, a receiving document is created and placed in the receiving in-box of the person designated to do the receiving. If the agency is set up for Desktop Receiving the shell will be available to the person who initiated the order. If the agency is set up for Central Receiving, the receiving must be done by the person or persons given the receiving role.

Non-infrastructure IT Goods and Services: These services will be ordered from a commercial supplier and Billed To the agency. Therefore, VITA does not require receiving in eVA for these items.

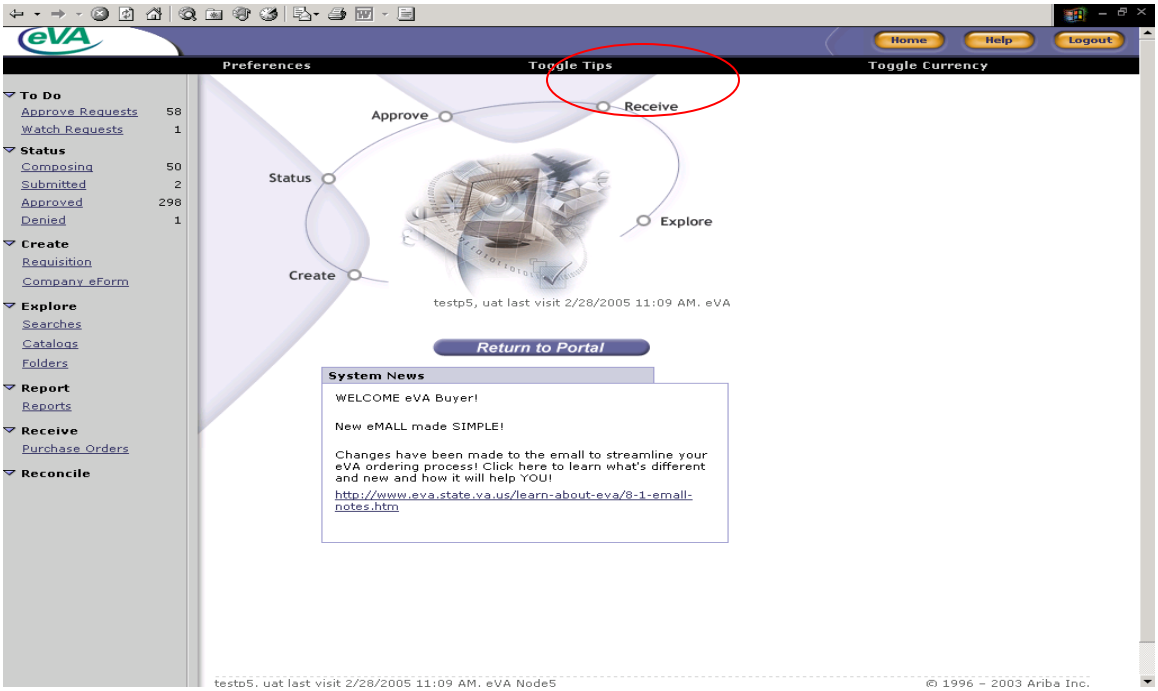


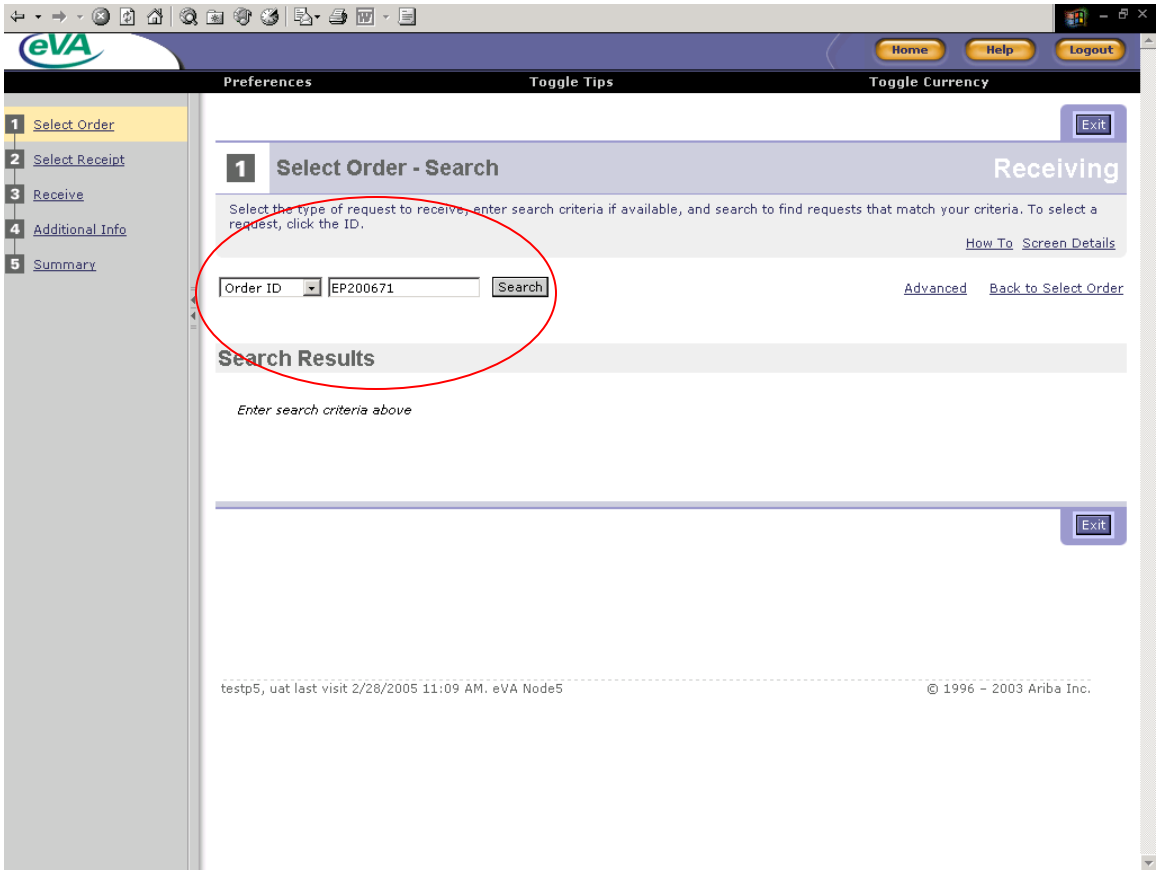
- To login go to www.eva.virginia.gov
- Enter your Userid and password and click login.

- At this screen click Shop Now on the left navigation bar.

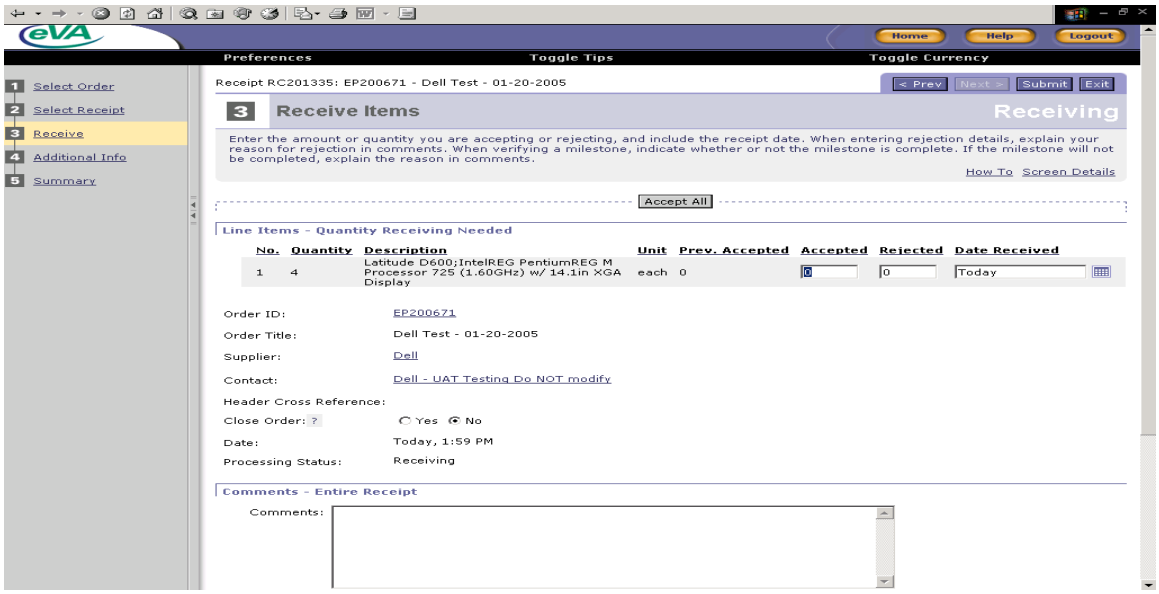


- Click on the Receive button

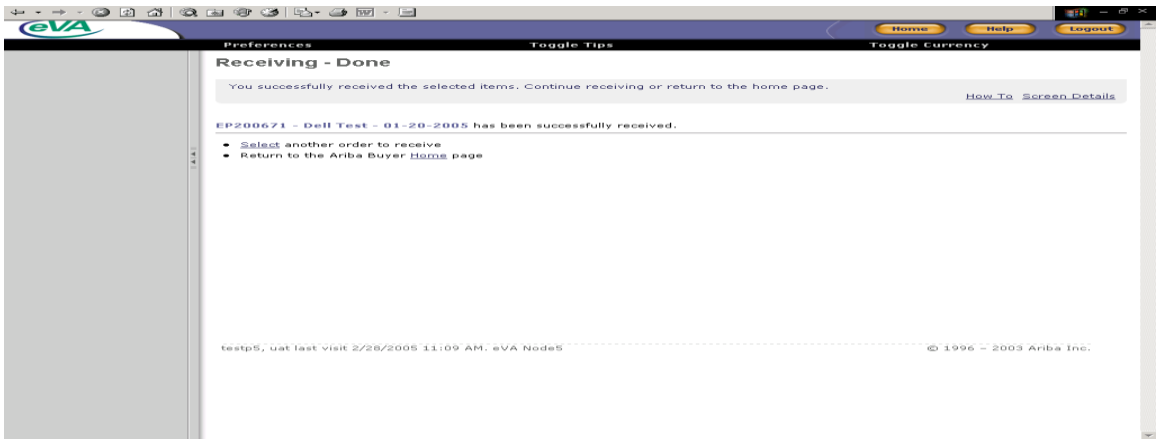




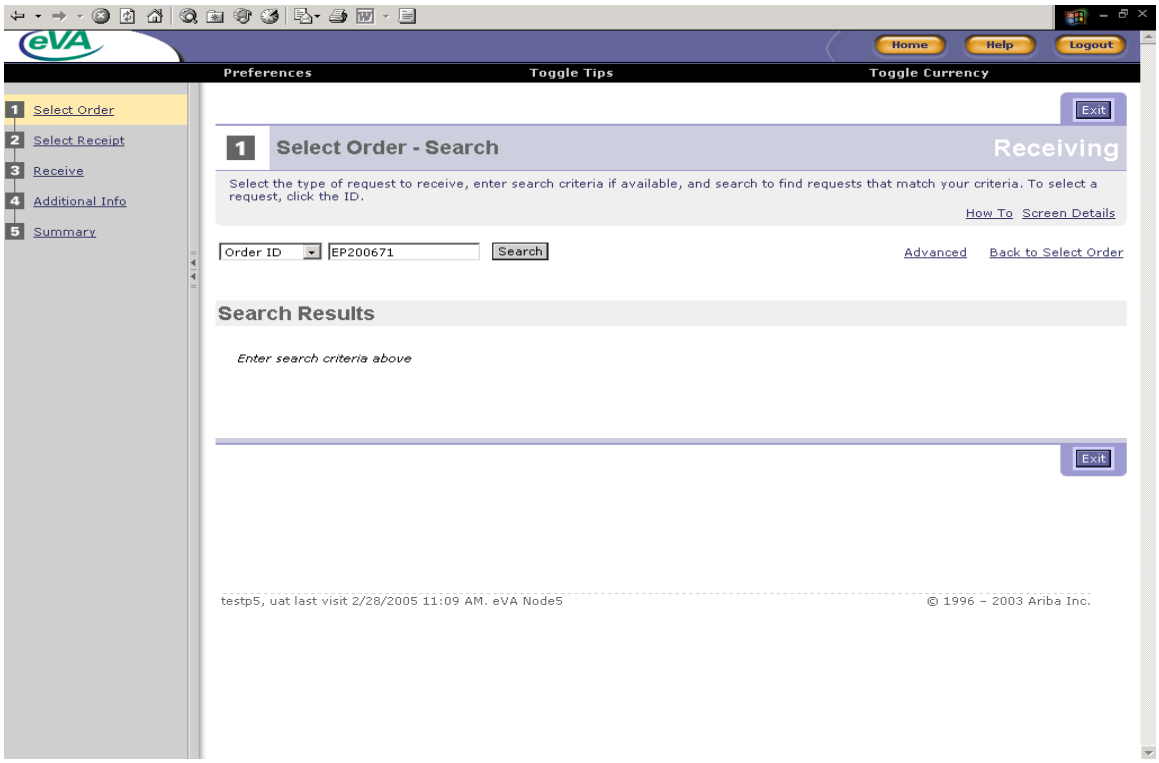
- Enter the order number (EP) that you wish to receive and click search.



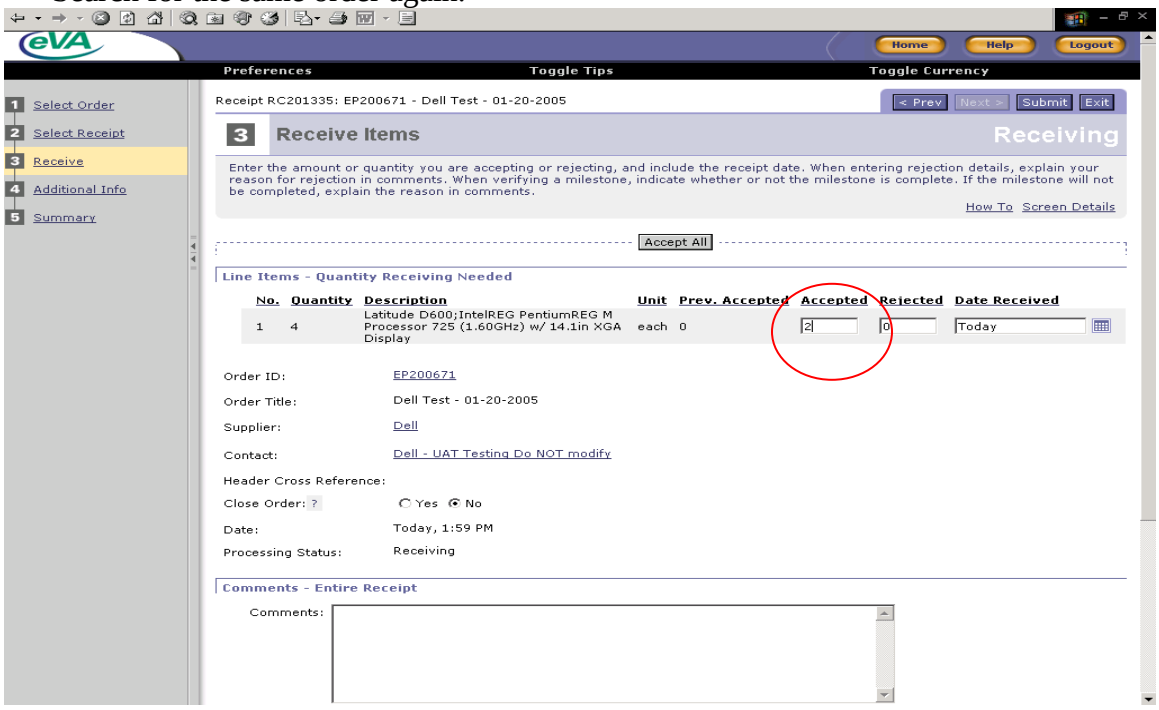
- The receiving document will open.
- If the entire order has been received, you can click Accept All at the top or you can type in the quantity received in the Accepted box.
- If you are receiving/accepting less than the full order quantity, type in the actual quantity received.
- The Date Received is defaulted to the current date. This date should be changed to reflect the actual date received by clicking on the calendar and selecting the received date.
- Note that the default on the Close Order is "No". If you do a partial receipt by entering a quantity of less than the quantity ordered or not receiving all lines, the system will create another receipt document for the remaining quantity and put it in the Receive folder.
- If you receive less than the full quantity and the remaining items will not be provided by the vendor, Close Order should be changed to "Yes". In this circumstance the system will not create another receiving document.
- After completing all entries, click the Submit button at the bottom of the screen.



- In the previous receipt, two of the four items were received.
- Clicked on return to Home.
- Click on Receive again.

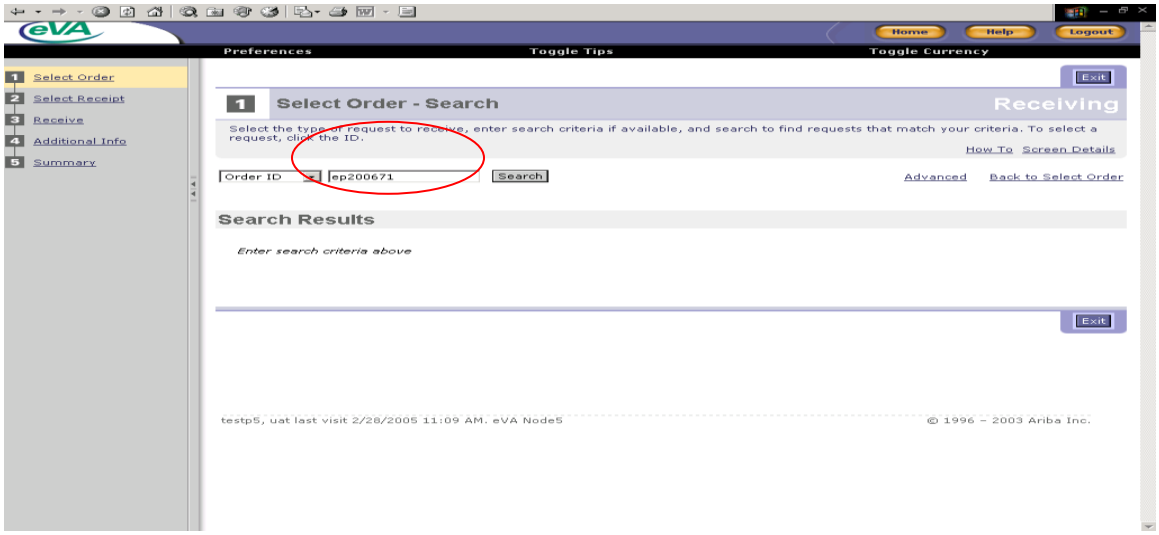


- Search for the same order again.

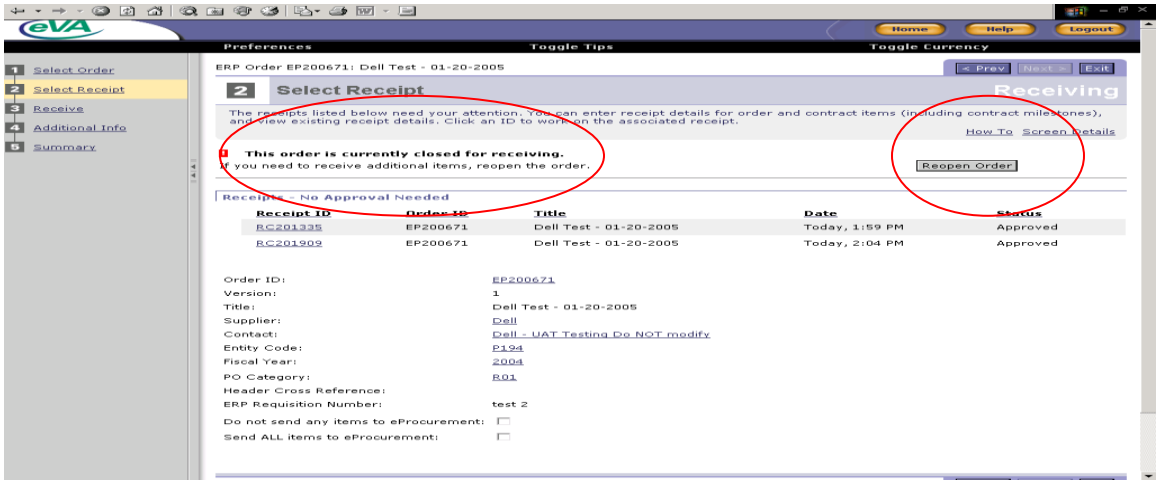


- Note: You will see 2 under Prev Accepted for the two previously received.
- An additional quantity is received.

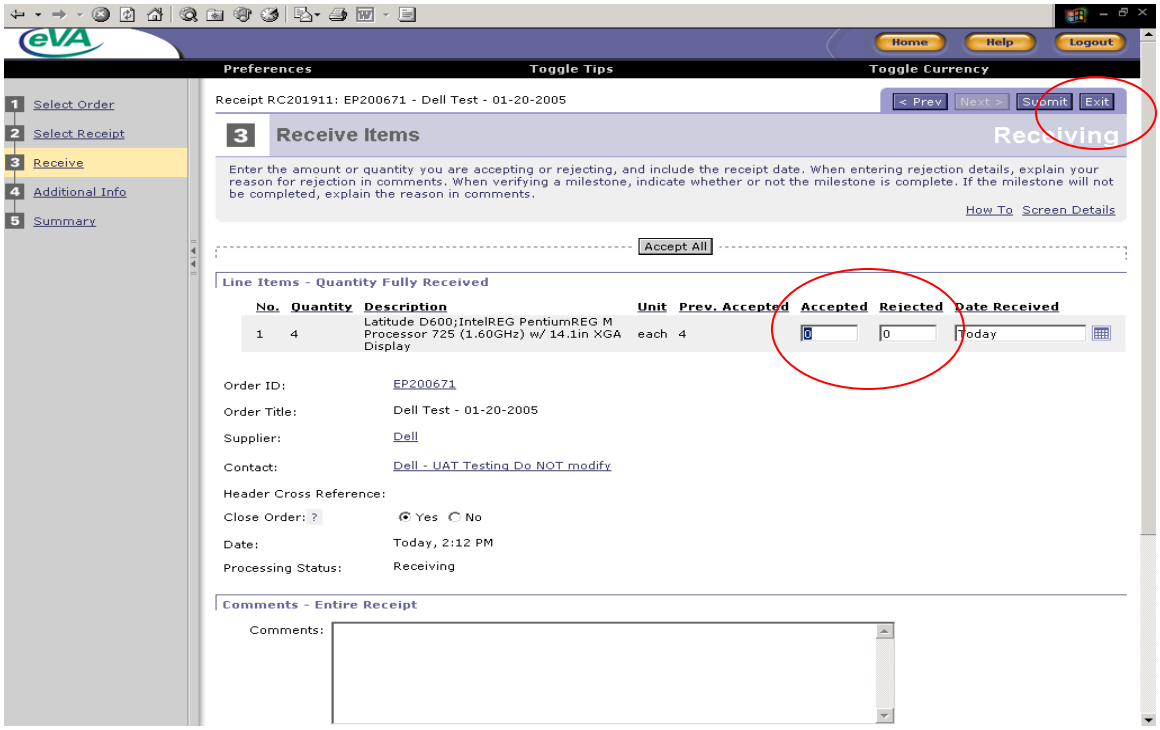
Re-open Order for Receiving to Create a Change Order: An order that has been fully received or has been closed for receiving must be re-opened for receiving before a change order can be created.



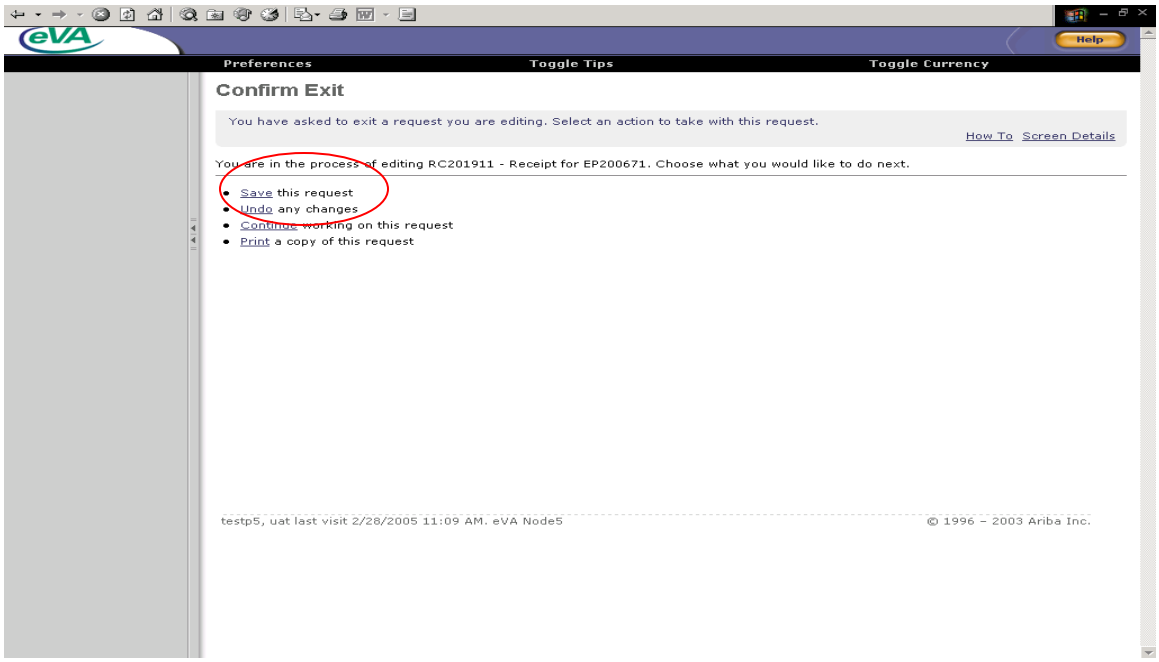
- In the previous steps we created two receipts for EP200671 to fully receive the order.
- There may be occasions when you need to re-open a closed order for additional receiving or you need to do a change order to add additional items to the original order.
- An order that has receiving closed can't be changed without re-opening for receiving.
- To re-open, go to Shop Now, Click the Receive button, enter the order number and click on Search.



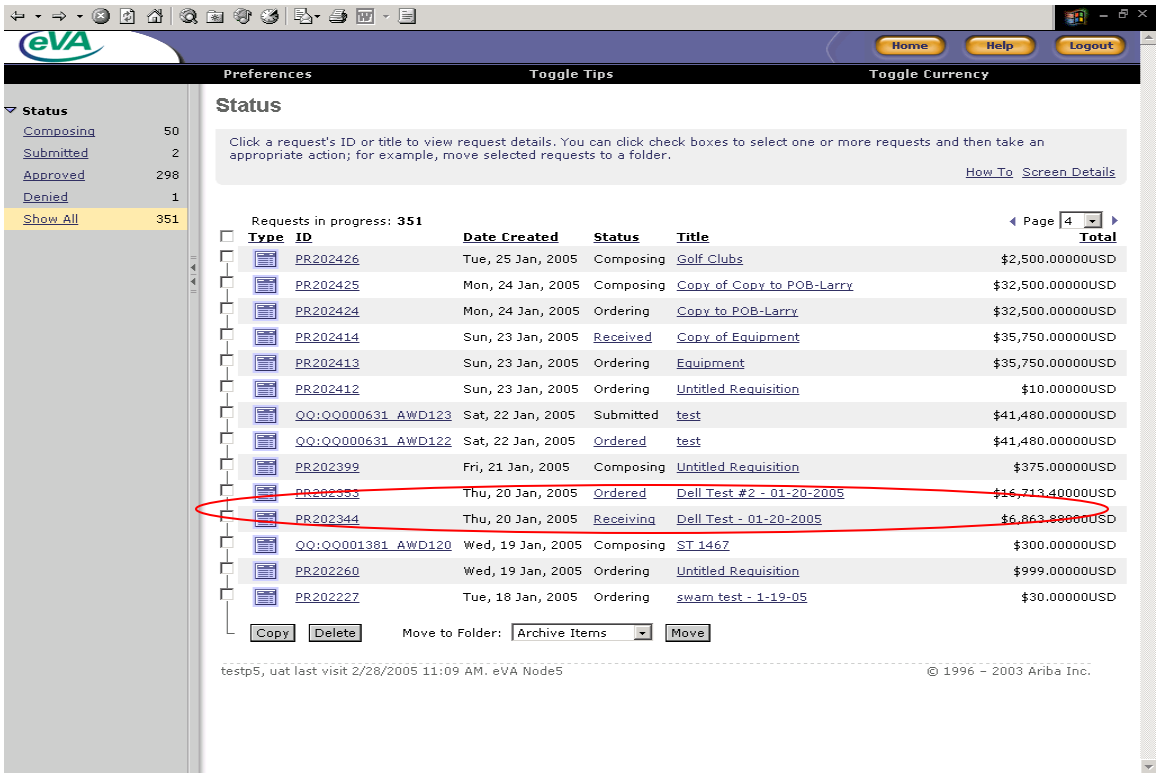
- Note that the order is closed to receiving.
- Click on the Reopen Order button.



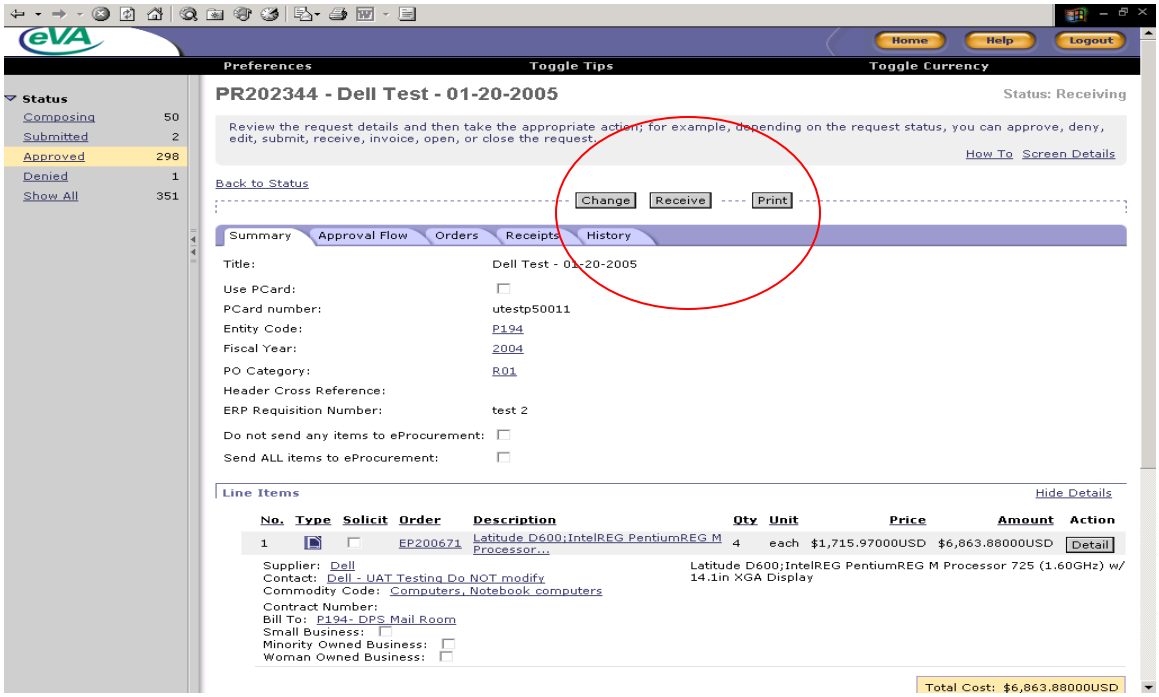
- The system opens a new receipt for additional receiving showing the ordered quantity fully received.
- Click Exit.



- Click the Save button to save the receipt for subsequent receiving.
- Return to the Home page.
- Click on Status.



- Note that the order is now back in a receiving status.
- Click on PR202344.



- Note that the order now has the Change Order button.
- Click Change to do a Change Order.
- You may now add items and you can make some edits to the fully received item. However, you cannot delete the fully received item nor can you delete the item.